

## Quality Review Sheet



This form is used to Quality Review the completed tax return based on the Intake/Interview Sheet, the documents provided for the return preparation, and a conversation with the taxpayer.

- Involve the taxpayer in the Quality Review process.
- Complete this form prior to obtaining the taxpayer's signature on required tax forms.
- Compare the completed return with the Intake/Interview Sheet and all supporting documents.

***Quality Reviews complete the Quality Process and help ensure an accurate return.***

### Verifying the Return      *Check each item only when you verify that the review step is complete.*

1. <input type="checkbox"/> Yes <input type="checkbox"/> No	A completed <b>Intake/Interview Sheet</b> was used to prepare this tax return.
2. <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Name(s) and SSNs/ITINs</b> for taxpayer(s) match the supporting documents.
3. <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>The taxpayer(s) address and Date of Birth</b> match the Intake/Interview Sheet and have been confirmed with the taxpayer.
4. <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Filing status</b> was correctly determined and is notated on the Intake/Interview Sheet.
5. <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Dependent information</b> is correctly shown including names, SSNs/ITINs, and DOBs.
6. <input type="checkbox"/> Yes <input type="checkbox"/> No	All <b>income</b> indicated on the Intake/Interview Sheet and W-2s/1099s is shown.
7. <input type="checkbox"/> Yes <input type="checkbox"/> No	Any <b>Adjustments to Income</b> are correctly reported.
8. <input type="checkbox"/> Yes <input type="checkbox"/> No	The completed return reflects the correct <b>standard deduction</b> unless itemized deductions were used. If <b>itemized deductions</b> were used, the Schedule A has been completed accurately based on supporting documents.
9. <input type="checkbox"/> Yes <input type="checkbox"/> No	The <b>non-refundable credits</b> have been correctly reported.
10. <input type="checkbox"/> Yes <input type="checkbox"/> No	All payments from <b>W-2s and F1099's</b> and estimated tax payments are correct.
11. <input type="checkbox"/> Yes <input type="checkbox"/> No	The <b>refundable credits</b> are correctly reported including the EIC determination based on the information provided.
12. <input type="checkbox"/> Yes <input type="checkbox"/> No	If <b>direct deposit or debit</b> was elected, information on the return matches the taxpayer's checking/saving account and routing information.

### Finishing the Return      Check the appropriate box once you have confirmed the steps have been taken.

- E-File:** Verify correct **DCN and SIDN** is printed on Form 8879. Obtain taxpayer signature and provide a copy of the return for their files. Retain original signed Form 8879 with the Forms W-2's and 1099's attached.
- Paper:** Verify the correct **SIDN** is printed on the return. Attach Forms W-2's and 1099's to the return.
- Obtain taxpayer signature and provide the signed return, a copy of the return, and the correct processing center mailing address to the taxpayer.
- All taxpayer questions/issues about the completed return have been answered.